

Job Aid:

How to Create a Bid using a Requisition

This Job Aid shows how to:

- Create an Open Market Requisition in COMMBUYS
- Convert a Requisition to a Bid

Of Special Note:







Bids are documents used to request price quotes from potential vendors for goods or services. Bids can either be a one-time request for goods and services, which would turn into an open market purchase order, or they can become a Master Blanket PO in COMMBUYS (formerly known as a contract or Master Agreement).

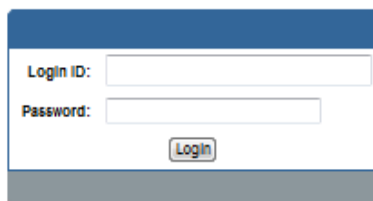
Screenshot



COMMBUYS is the only official procurement record system for the Commonwealth of Massachusetts' Executive Departments. COMMBUYS offers free internet-based access to all public procurement information posted here in order to promote transparency, increase competition, and achieve best value for Massachusetts taxpayers.

COMMBUYS INFORMATION: For more information on COMMBUYS please visit us at [COMMBUYS](https://www.commbuys.com). If you have any questions or concerns contact the COMMBUYS Help Desk at COMMBUYS@state.ma.us or ring us during normal business hours (8AM – 5PM Monday – Friday) at 1-888-827-8283 or 617-720-3197.

-  [Register](#)
Register here to begin using COMMBUYS.
Vendors, please read this [disclaimer](#) prior to registering.
-  [Complete Registration](#)
Complete registration here to begin using COMMBUYS.
Vendors, please read this [disclaimer](#) prior to completing registration.
-  [Open Bids](#)
Browse open bid opportunities.
-  [Active Contracts](#)
Browse active Contracts/Blankets.
-  [Contract & Bid Search](#)
Search for Bids and active Contracts/Blankets.
-  [Registered Vendor Search](#)
Search for registered vendors.



Directions

1. Launch the COMMBUYS Web site by entering the URL <https://www.commbuys.com/bsol> in the Browser.

Enter your login credentials and click the **Login** button on the COMMBUYS home page.

Job Aid:

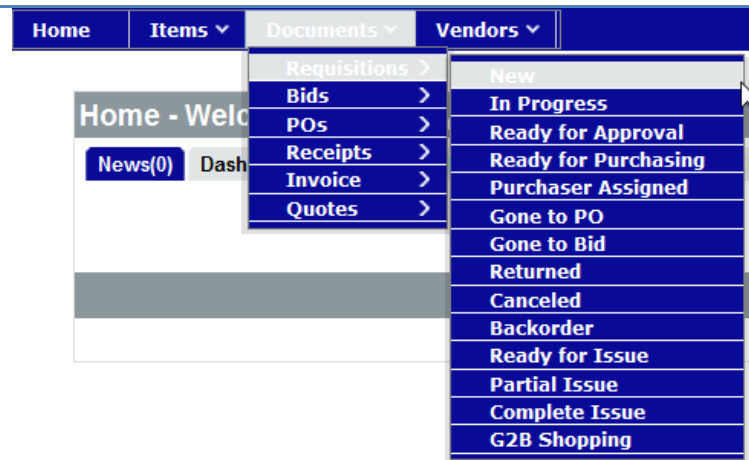
How to Create a Bid using a Requisition

Screenshot



Directions

2. Upon successful login, if you have multiple roles in COMMBUYS, select the **Basic Purchasing** role tab on the upper right side of the page.



3. From the Navigation Bar, select **Documents > Requisitions > New**

New Requisition

General	Items	Address	Accounting	Routing	Attachments	Notes	Reminders	Summary
Requisition Number: Status: 1RI - Requisition In Progress (When User request is created) Department*: 00100 - PETS PLUS Location*: 100 - BOS-PP Required By Date: <input type="text"/> Requisition Type: <input type="text"/> Requestor: Buyer Buyer Contact: Buyer Buyer Alternate ID: <input type="text"/> Estimated Cost: \$0.00 Print Format: * <input type="text"/>								

4. The General tab for the requisition opens. On the left side of the screen, complete the following fields:

- **Department:** defaults from user profile. May be changed, using the dropdown if other departments are available to user.
- **Location:** defaults from user profile. May be changed, using the dropdown if other locations are available to user.
- **Required by Date:** optional
- **Requisition Type:** Open Market
- **Requester:** user that created the requisition; this field cannot be edited
- **Contact:** contact for this requisition
- **Estimated Cost:** calculated by COMMBUYS; not editable by user
- **Alternate ID:** leave blank

Job Aid:

How to Create a Bid using a Requisition

Screenshot

Directions

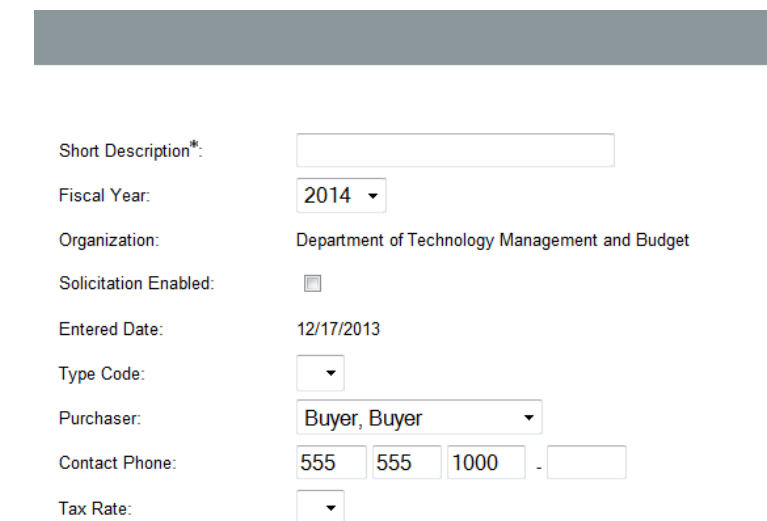
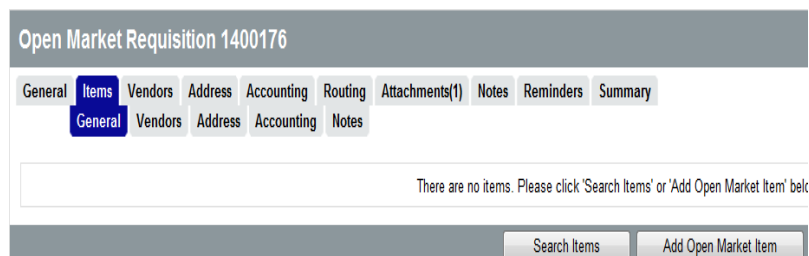
5. The right half of the **General** tab, complete the following fields:

- **Short Description:** be specific as this field is also used as search criteria to locate a requisition; may use any Departmental Identifier numbers.
- **Fiscal Year:** defaults to the current Fiscal Year
- **Organization:** default value based on your user profile and can only be changed by an administrator
- **Solicitation Enabled:** only select if this is not an open market requisition
- **Entered Date:** defaults to the current date and cannot be changed
- **Type Code:** type options are based upon the requisition type
- **Purchaser:** defaults to your name; use the dropdown to select a different purchaser
- **Contact Phone:** defaults to the profile value; can be updated as needed
- **Tax Rate:** n/a for Commonwealth

When complete, click the **Save & Continue** button to save the information entered on the General tab.

6. To add items to the requisition, click on the **Items** tab.

Click the **Add Open Market Items** button to begin the process of adding items to the requisition.

Job Aid:

How to Create a Bid using a Requisition

Screenshot

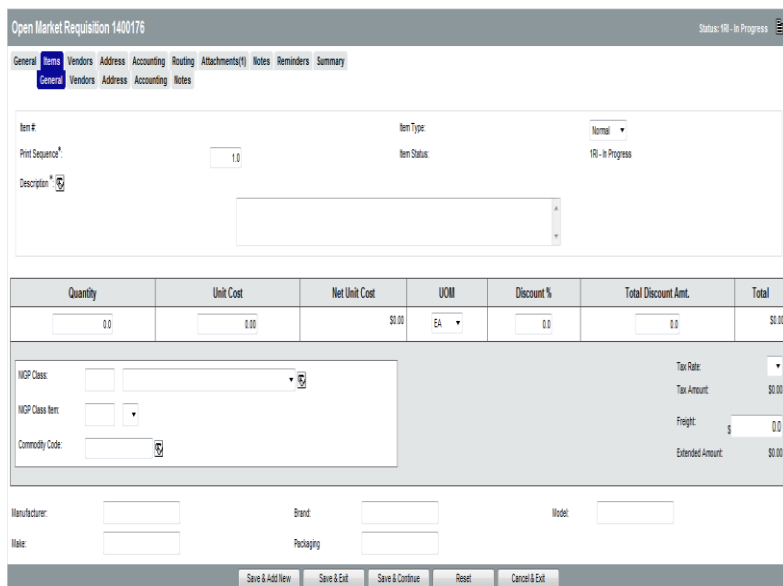
Directions

7. The **Items** tab opens to a blank entry form to add either an Open Market or Narrative item to the requisition.

The following are fields that should be completed for an open market item:

- **Item #:** COMMBUYS automatically sequentially numbers each item added to the requisition
- **Item Type:** two options:
 - Normal – default value
 - Narrative – permits the addition of a non-item to allow an additional description to appear on the requisition
- **Print Sequence #:** change this field if the order the requisition line items should print is different from the Item # order
- **Item Status:** COMMBUYS auto updates based on the requisition status.
- **Description*:** description of the item or service; can hold up to 100 characters.
- **Quantity:** enter quantity if known or enter 1 if unknown
- **Unit Cost:** enter cost of item/service per 'unit' of quantity
- **Net Unit Cost:** COMMBUYS auto updates
- **UOM:** unit of measure; how the item is sold/packaged/purchased
- **Discount %:** percentage discount for item/service if applicable
- **Total Discount Amt.:** total amount of discount – populate based on cost and discount %
- **Total:** COMMBUYS auto updates
- **UNSPSC:** each item/service is required to have a corresponding UNSPSC code, use the eye glass icon to search and select the most appropriate UNSPSC class (more detail on Step 8)
- **Freight:** enter freight costs if known

Note: Fields marked with (*) are required. If a field is not included in the above list, it is an optional field.





How to Create a Bid using a Requisition

Directions

8. Click the eyeglass icon to add UNSPSC codes to the item/service. The Search Code screen populates, use the available search dropdowns and fields to find the best code.

Select the radio button on the left side of the screen and click the **Save & Exit** to return to the Items tab.

9. After each item is added to the requisition, there are five options:

- **Save & Add New** – saves the item to the requisition and opens a new item entry so additional items can be added
- **Save & Exit** – saves the item, closes the item entry page and returns to the Requisition Items General tab
- **Save & Continue** – saves the item and remains on the item entry page
- **Reset** – removes the item from the requisition without saving it
- **Cancel & Exit** – cancels the item and exits from the item entry page.

Repeat steps 6 and 9 until item entry is complete.

10. Once complete, review the requisition item(s).

Next, select the Requisition Items **Address** tab.

Job Aid:

How to Create a Bid using a Requisition

Screenshot

Open Market Requisition 1400176

General **Items** Vendors Address Accounting Routing Attachments(1) Notes Reminders Summary

General Vendors **Address** Accounting Notes

Item Address Validation Errors

- Item # 1, 2: No ship-to address, and there is no valid ship-to address at header level.

Item #	Description	Ship-to Address
1	Blue Fine Point Pens	<input type="text"/>
2	yellow highlighters	<input type="text"/>

Ship-to Address:

Bill-to Address:

Directions

11. The **Requisition Items Address** page opens. Displayed here is the left side of the page with the Ship-to Address. Update this if items are being shipped to multiple locations or to an address different than the Bill to Address.

The Address page should prefill – if no change is required go to step 16.

If there is an error message indicating that no valid ship-to address exists. Click on the look-up (eyeglass icon) to select a ship-to address.

You can either select the Ship-to-Address for each item or use the Ship-to-Address at the bottom of the page to search and apply to all items.

12. Enter the search criteria. Click **Find It** to view the search results.

If no criteria is known clicking **Find it** will return all possible organization addresses.

Lookup Item Ship-to Address - Open Market Requisition 1400176/ ItemNbr: 1

Search Using: ALL of the criteria

Search Fields:

Department ID	<input type="text"/>	Department Name	PETS
Department Suffix ID	<input type="text"/>	Department Suffix Name	<input type="text"/>
Location ID	<input type="text"/>	Location Name	<input type="text"/>
City	<input type="text"/>	County	<input type="text"/>

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

13. The search results display.

Select the desired Address by clicking the radio button in the Select column.

Click the **Select** button.

Select	Department ID	Department Name	Department Suffix ID	Department Suffix Name
<input type="radio"/>	00100	PETS PLUS	100	10055

Job Aid:

How to Create a Bid using a Requisition

Screenshot

Open Market Requisition 1400176


General **Items** Vendors Address Accounting Routing Attachments(1) Notes Reminders Summary

General Vendors **Address** Accounting Notes

Item Address Validation Errors

- Item # 1, 2: No ship-to address, and there is no valid ship-to address at header level.

Item #	Description	Ship-to Address
1	Blue Fine Point Pens	100 - 10055 Anne Bell One Congress Street 11th floor Boston, MA 02114 US Email: linda.banks-grant@accenture.com Phone: (617)999-9999
2	yellow highlighters	

Ship-to Address: 

Directions

14. The pop-up window closes and the selected address populates.

Repeat steps 11 – 13 if you need to add a different Ship-to Address for each requisition line item.

Open Market Requisition 1400176

General **Items** Vendors Address Accounting Routing Attachments(1) Notes Reminders Summary

General Vendors **Address** Accounting Notes

Item #	Description	Ship-to Address
1	Blue Fine Point Pens	100 - 10055 Anne Bell One Congress Street 11th floor Boston, MA 02114 US Email: linda.banks-grant@accenture.com Phone: (617)999-9999
2	yellow highlighters	100 - 10055 Anne Bell One Congress Street 11th floor Boston, MA 02114 US Email: linda.banks-grant@accenture.com Phone: (617)999-9999

15. Once all Ship-to Addresses are added to the requisition, click **Save & Continue** located at the bottom of the page to save the changes.

The page will save, refresh and the error messages disappear.

Next click the **Vendors** tab.



OPERATIONAL SERVICES DIVISION

Job Aid:

How to Create a Bid using a Requisition

Screenshot

Directions

General Items **Vendors** Address Accounting Routing Attachments Notes Reminders Summary

Vendor Validation Warnings

- No recommended vendor.

Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method	Vendor Remit-to Address
<input type="text"/>				

- ☐ Publish Informal Bid On Web
- ☐ Show Unit Prices to Vendors
- ☐ Allow Vendor to Change Quantity
- ☐ Allow Vendor to Change UOM

Select bidder participation

- ☐ Unrestricted informal bid, all vendors can view and respond
- ☐ Restricted informal bid, only selected vendors can view and respond

Informal Bid Date Section

Bid Ending Date:*(MM/DD/YYYY HH:MM:SS AM or PM)

Bid Available Date:(MM/DD/YYYY HH:MM:SS AM or PM)

Purge Date:(MM/DD/YYYY)

Save & Continue

Lookup & Add Vendors

Print

Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.

16. On the Vendor tab click the **Lookup & Add Vendors** button at the bottom of the page.

Lookup & Add Reference Vendors - Requisition RQ-15-1080-1080C-1080L-0000000804

Search Using:	ALL of the criteria ▼			
	<input type="button" value="Find It"/> <input type="button" value="Clear"/>			
Search Fields:	Vendor ID <input type="text"/>	Vendor Name <input type="text"/>	Vendor Tax ID <input type="text"/>	Vendor Legal Name <input type="text"/>
	Vendor Keyword <input type="text"/>	Alternate ID <input type="text"/>	ZIP Code <input type="text"/>	County <input type="text"/>
	State <input type="text"/>			

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
0 1 2 3 4 5 6 7 8 9 10

Find It

Clear

Find Vendors for All Commodity-EPP on the Req

Close Window

Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.

17. A popup window appears with a Vendor advanced search page.

Enter vendor search criteria, click **Find It** and select the desired vendor(s) from the search results. Click **Save & Exit** to return to the Vendors tab.

Alternatively, scroll to the bottom of the page and click **Find Vendors for All Commodity-EPP on the Req**

Job Aid:

How to Create a Bid using a Requisition

Screenshot

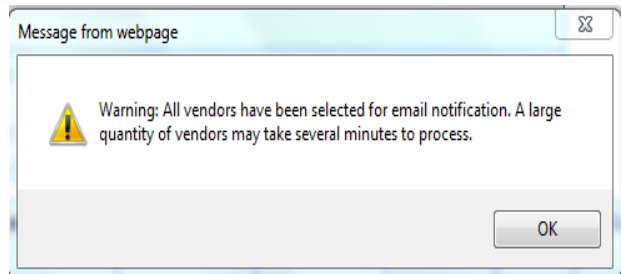
Select	Vendor ID	Vendor Name	Alternate ID	Last PO Date
<input type="checkbox"/>	00000267	Barker Steel LLC / Harris Rebar		
<input type="checkbox"/>	300219	Biomarine, Inc.		
<input type="checkbox"/>	300049	Clean Harbors		Mar 31, 2014
<input type="checkbox"/>	222129	1-Stop Design Shop, Inc.		Mar 31, 2014
<input type="checkbox"/>	207441	146 SUPPLY CENTER INC		Apr 7, 2014

Directions

18. The results will display with the Vendors who selected the same commodity code as the bid item(s).

Click the top Select button to check all the Vendors.

Click **Save & Exit** to return to the Vendors tab.



19. A popup window displays with a Warning Message.

Click **OK**. The popup window will disappear and all information populates in the requisition.

General Items Vendors Address Accounting Routing Attachments Notes Reminders Summary

Vendor Validation Warnings

No recommended vendor

Delete	Vendor ID	Alternate ID	Vendor Name	Preferred Delivery Method	Vendor Remark Address	Recommended	Informal Quote
<input type="checkbox"/>	0000062		7 Generations Inc	Email	General Mailing Address - Loretta Martino Sanford P.O. Box 713 Peppewell, MA 01463 US Email: marti@generationsinc.com Phone: (877)777-6788 Fax: (978)450-6028 Website: http://www.7generationsinc.com ID: 2559	<input type="checkbox"/>	No Quote
<input type="checkbox"/>	00001219		382 Communications Corporation	Paper Copy Mailed	General Mailing Address - Leah Barton 400 Crown Colony Drive 6th Floor Quincy, MA 02169 US Email: leah@382corp.com Phone: (617)639-9005 ID: 2559	<input type="checkbox"/>	No Quote
<input type="checkbox"/>	00001804		A La CARTA Connection	Paper Copy Mailed	General Mailing Address - Jana Colter 7819 Pine Ridge Road Louisville, KY 40241 US Email: jcolter@alacarta.com Phone: (502)503-3239 Fax: (502)731-6880 ID: 3410	<input type="checkbox"/>	No Quote
<input type="checkbox"/>	00001872		ABB Energy Conservation, Inc.	Paper Copy Mailed	General Mailing Address - KAREN FOUCHE 25551 N. U.S. Hwy 301 Dade City, FL 33623 CAN Email: kfouche@abbenergy.com Phone: (248)433-3452 ID: 3452	<input type="checkbox"/>	No Quote
<input type="checkbox"/>	00001939		A-Plus Construction Services Corporation	Email	General Mailing Address - Michael Coleman 17 Accord Park Drive, Suite 102 Norwalk, MA 02061 US Email: mcolem@apluscs.com Phone: (781)861-6887 Fax: (781)861-6873 ID: 3536	<input type="checkbox"/>	No Quote

☐ Publish Informal Bid On Web
☐ Show Unit Prices to Vendors
☐ Allow Vendor to Change Quantity
☐ Allow Vendor to Change UOM
☐ Select lowest participation
☐ Unrestricted informal bid, all vendors can view and respond
☐ Restricted informal bid, only selected vendors can view and respond

Informal Bid Date Section

Bid Ending Date (MM/DD/YYYY HH:MM:SS AM or PM)
 Bid Available Date (MM/DD/YYYY HH:MM:SS AM or PM)
 Purge Date (MM/DD/YYYY)

20. The **Vendors** tab will now display all the Vendors you selected.

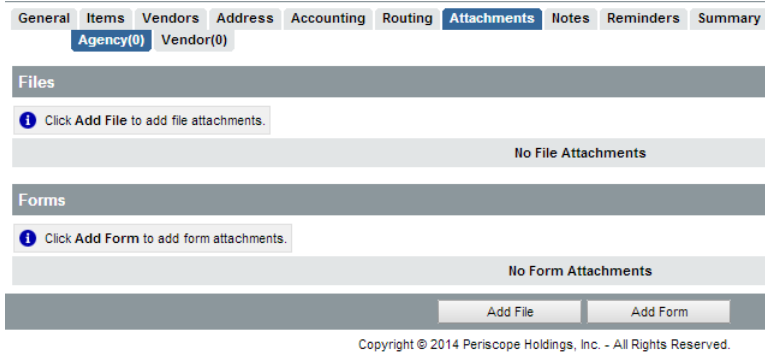
You can delete vendors by using the left Delete column, and/or you can continue to add Vendors by clicking **Lookup & Add Vendors**.

- generally Vendor should not be deleted from open bids

Job Aid:

How to Create a Bid using a Requisition

Screenshot



General Items Vendors Address Accounting Routing **Attachments** Notes Reminders Summary

Agency(0) Vendor(0)

Files

Click Add File to add file attachments.

No File Attachments

Forms

Click Add Form to add form attachments.

No Form Attachments

Add File Add Form

Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.

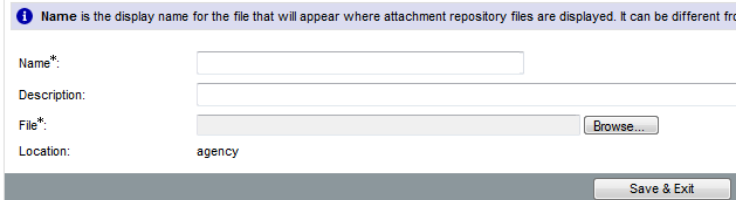
Directions

21. Click the **Attachments** tab. The Attachments tab is where all files attached to the requisition display.

Click the **Add File** button.

Note: Add Form is not currently a working function in COMMBUYS

Add File



Name* is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk.

Name*:

Description:

File*: Browse...

Location: agency

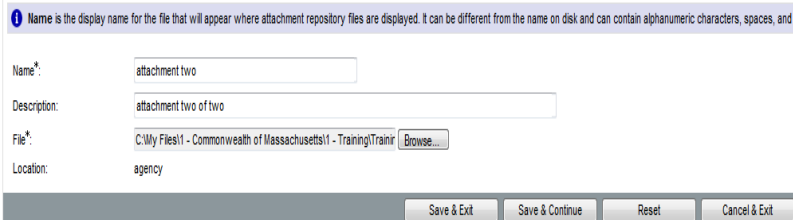
Save & Exit

22. The Add File window opens. Complete the following fields:

- Name** – required; but will be populated with the file name if left blank
- Description** - optional

Click the **Browse** button to select a file.

Add File



Name* is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters, spaces, and

Name*: attachment two

Description: attachment two of two

File*: C:\My Files\1 - Commonwealth of Massachusetts\1 - Training\Trainin Browse...

Location: agency

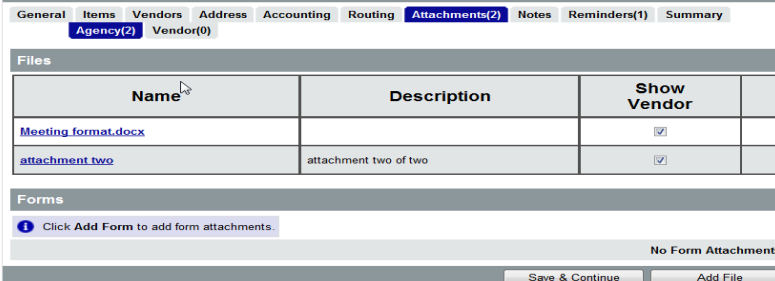
Save & Exit Save & Continue Reset Cancel & Exit

23. The Name field prefills with File Name and may be edited to better describe Document being attached.

The Description field – you may enter a description. Not required

To add another file, click the **Save & Exit** button. Repeat as necessary until all required documents are added.

Open Market Requisition 1400176



General Items Vendors Address Accounting Routing **Attachments(2)** Notes Reminders(1) Summary

Agency(2) Vendor(0)

Files

Name	Description	Show Vendor
Meeting format.docx		<input checked="" type="checkbox"/>
attachment two	attachment two of two	<input checked="" type="checkbox"/>

Forms

Click Add Form to add form attachments.

No Form Attachments

Save & Continue Add File

24. Attachment tab redisplay with a list of attached files.

Job Aid:

How to Create a Bid using a Requisition

Screenshot

Open Market Requisition 1400176

General Items Vendors Address Accounting Routing Attachments(2) Notes Reminders **Summary**

Overall Validation Warnings

- Item # 1, 2: No vendor, and there is no recommended vendor at header level.

Header Information

Requisition Number:	1400176	Short Description:	Test Requisition
Organization:	Operational Services Division	Location:	100 - BOS-PP
Department:	00100 - PETS PLUS	Requisition Type:	Open Market
Entered Date:	12/17/2013	Purchaser:	Buyer Buyer
Requestor:	Buyer Buyer	Contact Phone:	(555)555-1000
Contact:	Buyer Buyer	Print Format:	
Estimated Cost:	\$787.50	Bill-to Address:	Inventory User 211 E. 7th Street Suite 1100 211 E. 7th Street Austin, TX 78701 US Email: g.flores@perscopeholdings.com Phone: (512)650-9410
Solicitation Enabled:	No		
Ship-to Address:			

Attachments: [Meeting format.docx](#), [attachment two](#)

Directions

25. Click the **Summary** tab. The **Summary** tab displays a summary view of the completed requisition.

Click **Submit for Approval** at the bottom of the page.

Skipped Tabs:

- **Accounting: Phase II**
- **Routing:** populates after submission for approval
- **Notes:** optional, only viewed internally
- **Reminders:** optional, internal reminders sent to organization users

Home Items Documents Vendors

Home - Welcome

News(1) Dashboard

News ID

3

Requisitions >

Bids >

POs >

Receipts >

Invoice >

Quotes >

New

In Progress

Ready for Approval

Ready for Purchasing

Purchaser Assigned

Gone to PO

Gone to Bid

Returned

Canceled

Backorder

Ready for Issue

Partial Issue

Complete Issue

G2B Shopping

26. Once approved, locate the approved requisition by using the Documents dropdown from the Navigation bar.

- **Documents > Requisitions > Ready for Purchasing**

The requisition will also be in your control center under **Reqs** and **Ready for Purchasing**.

Requisitions - Ready for Purchasing

Requisition #	Requisition Date
1400329	01/13/2014
1400307	01/09/2014
1400306	01/09/2014
1400302	01/09/2014
1400289	01/07/2014
1400275	12/26/2013
1400188	12/18/2013

27. Requisitions meeting the criteria display. Click the desired blue hyperlink in the **Requisition #** column to open the Bid.

28. The requisition opens to the **Summary** tab.

Scroll to the bottom of the page and click the **Convert to Bid** button.

Convert to Bid Convert to PO Cancel Requisition Clone Requisition Print

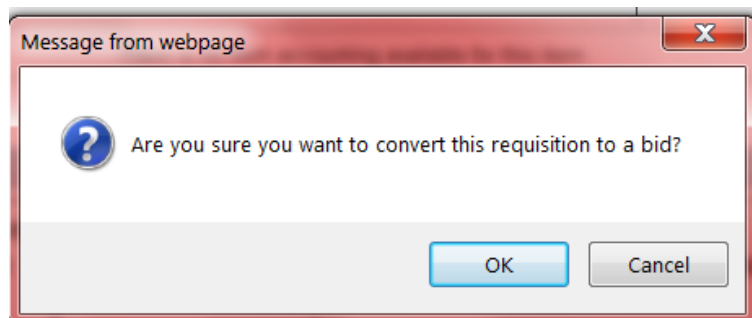
Job Aid:

How to Create a Bid using a Requisition

Screenshot

Directions

29. Click the **OK** button to confirm.



30. The Bid screen opens to the **General** tab where any necessary updates can be made.

All information from the requisition is populated into the Bid.

The fields that require completion include:

- **Available Date** – Enter the date the Bid (solicitation) is made available to vendors to submit quotes. Click the calendar icon to set the desired month, day, and time.
- **Bid Opening Date** – date the Bid will close and quotes can be opened for viewing. Click the calendar icon to set the desired month, day, and time.

Open Market Bid 00000144

General Items Address Accounting Routing Attachments Notes Bidders Questions Amendments Q & A Remi

General Validation Errors

- The following required fields are missing: bid opening date, available date.

Bid Number: 00000144

Status: 2BI - In Progress

How Solicited: Email

Department: BSAS - Bureau of Substance Abuse Services

Location: 2300 - Central SA

Show on Web: ☒

Required Date: 01/14/2014

Available Date: (MM/DD/YYYY HH:MM:SS AM or PM)

Bid Type: Open Bid

Control Code:

Print Dest Detail: Always

Purchase Method: Open Market

Tax Rate:

Item Single Award Only: ☐

Status: 2BI - In Progress

rs Summary

Description: Snow Man Party

Purchaser: Buyer, Buyer

Type Code:

Fiscal Year: 2014

Organization: Operational Services Division

Allow Electronic Response: ☒

Bid Opening Date: (MM/DD/YYYY HH:MM:SS AM or PM)

Purge Date: (MM/DD/YYYY)

Informal Bid: ☐

Estimated Cost: \$750,050.00

Alternate ID:

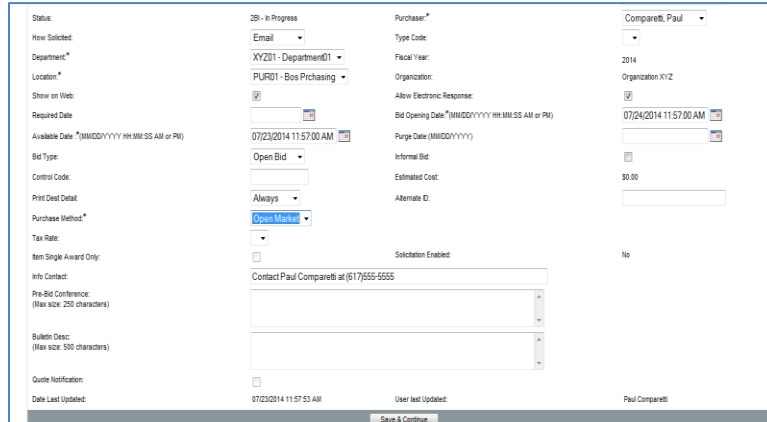
Print Format: Bid Print

Solicitation Enabled: No

Job Aid:

How to Create a Bid using a Requisition

Screenshot



The screenshot shows a web form for creating a bid. The 'Purchase Method' dropdown is highlighted and set to 'Open Market'. Other visible fields include 'Status' (2B - In Progress), 'Department' (XYZ01 - Department01), 'Location' (PUR01 - Bos Procuring), 'Required Date' (07/23/2014 11:57:00 AM), 'Bid Type' (Open Bid), 'Control Code', 'Print Desc Detail', 'Tax Rate', 'Item Single Award Only', 'Info Contact', 'Pre-Bid Conference', 'Bulletin Desc', 'Quote Notification', and 'Date Last Updated' (07/23/2014 11:57:53 AM). A 'Save & Continue' button is at the bottom.

Directions

31. The following options display in the **Purchase Method** dropdown:

- Open Market: (For a one time purchase/award)
- Contract: **(Do not use this option)**
- Blanket: (If the Bid is going to result in a contract award)

Note: The **Contract** option should never be selected

32. If **Blanket** is selected, a pop-up message appears. Click OK and two new fields display and must be completed:

- **Blanket Begin Date:** (estimated contract begin date)
- **Blanket End Date:** (estimated contract end date)

33. From the **Type Code** dropdown select one of the following:

- **SW:** (bid for a statewide contract)
- **NS:** (bid for a non-statewide, departmental contract)

Click **Save and Continue** to save all changes.


34. Click the **Items** tab. The Items tab for the Bid opens.

Click the **Address** tab. Verify the Ship-to and Bill-to address.

Click the **Attachments** tab. Verify and/or add files to the Bid if needed. To add a file, click the **Add File** button.

The **Amendments** tab has no functionality until after the Bid is posted.

Note: Review all information on the above tabs to ensure data is imported accurately from the Requisition.



The screenshot shows a dropdown menu labeled 'Type Code:' with a downward arrow button.

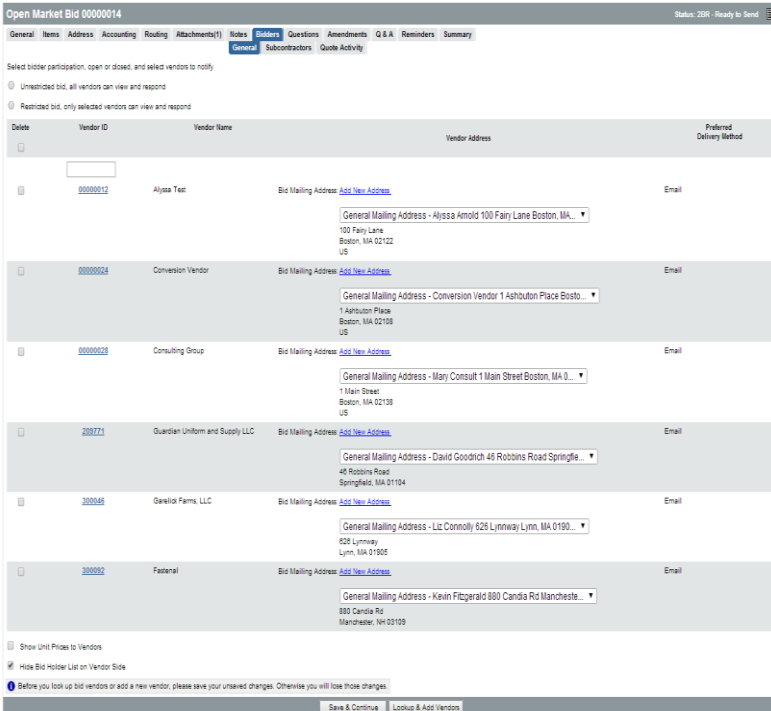
Open Market Bid 00000014

General Items Address Accounting Routing Attachments(1) Notes Bidders Questions Amendments Q & A Reminders Summary

Job Aid:

How to Create a Bid using a Requisition

Screenshot



Open Market Bid 00000014 Status: 20R - Ready to Send

General Items Address Accounting Routing Attachments Notes **Bidders** Questions Amendments Q & A Reminders Summary

Select bidder participation, open or closed, and select vendors to notify

☐ Unrestricted bid, all vendors can view and respond

☐ Restricted bid, only selected vendors can view and respond

Delete	Vendor ID	Vendor Name	Bid Mailing Address	Preferred Delivery Method	Email
<input type="checkbox"/>	00000012	Alyssa Test	General Mailing Address - Alyssa Arnold 100 Fair Lane Boston, MA, US 100 Fair Lane Boston, MA 02122 US		
<input type="checkbox"/>	00000024	Conversion Vendor	General Mailing Address - Conversion Vendor 1 Ashbourn Place Bosto... 1 Ashbourn Place Boston, MA 02108 US		
<input type="checkbox"/>	00000029	Consulting Group	General Mailing Address - Mary Consult 1 Main Street Boston, MA 0... 1 Main Street Boston, MA 02108 US		
<input type="checkbox"/>	200771	Guardian Uniform and Supply LLC	General Mailing Address - David Goodrich 48 Robbins Road Springfie... 48 Robbins Road Springfield, MA 01104		
<input type="checkbox"/>	200046	Genelick Farms, LLC	General Mailing Address - Liz Connolly 626 Lynnway Lynn, MA 0190... 626 Lynnway Lynn, MA 01905		
<input type="checkbox"/>	200092	Farnest	General Mailing Address - Kevin Fitzgerald 880 Candia Rd Mancheste... 880 Candia Rd Manchester, NH 03109		

☐ Show Unit Prices to Vendors

☒ Hide Bid Holder List on Vendor Side

Before you look up bid vendors or add a new vendor, please save your unsaved changes. Otherwise you will lose those changes.

Save & Continue Lookup & Add Vendors

Directions

35. Click the **Bidders** tab.

There is no Vendor tab on the Bid. COMMBUYS now refers to them as Bidders. All Vendors entered on the requisition will now be listed as Bidders.

In most cases, the Bid will be open, so there is no need to click either radio button for Unrestricted or Restricted bid.

- If a restricted bid is desired, click the radio button next to **Restricted bid, only selected vendors can view and respond**.

If you want vendors to see your price, select the **Show Unit Prices to Vendors** checkbox, and deselect the **Hide Bid Holder List on Vendor Side** checkbox.

To add more Bidders, click **Lookup & Add Vendors** button.

If any changes have been made click, **Save & Continue**.

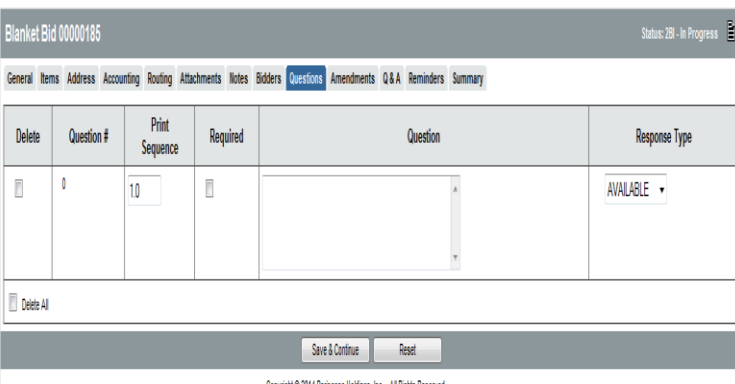
36. Click the **Questions** tab.

Ask vendors questions by entering text in the **Question** field.

Select the **Required** checkbox if the questions must be answered before the quote can be submitted by the vendor.

Select a value from the **Response Type** drop-down list to establish a format for the vendor response.

Select the **Save & Continue** button to save your entries.



Blanket Bid 00000185 Status: 20R - In Progress

General Items Address Accounting Routing Attachments Notes **Bidders** **Questions** Amendments Q & A Reminders Summary

Delete	Question #	Print Sequence	Required	Question	Response Type
<input type="checkbox"/>	0	1.0	<input type="checkbox"/>		AVAILABLE

Delete All

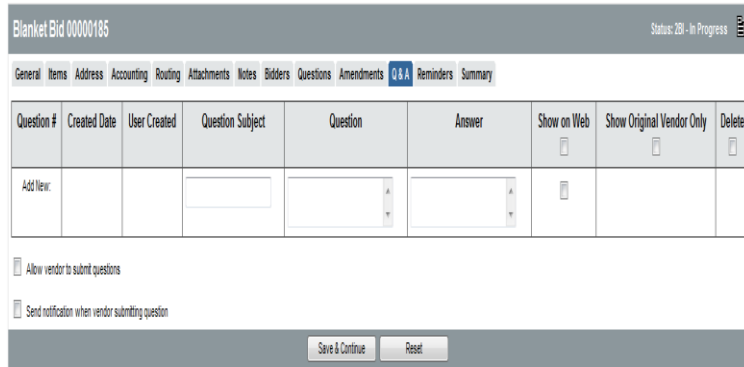
Save & Continue Reset

Copyright © 2014 Operations Software, Inc. All Rights Reserved

Job Aid:

How to Create a Bid using a Requisition

Screenshot



Blanket Bid 00000185 Status: 281 - In Progress

General Items Address Accounting Routing Attachments Notes Bidders Questions Amendments **Q&A** Reminders Summary

Question #	Created Date	User Created	Question Subject	Question	Answer	Show on Web	Show Original Vendor Only	Delete
Add New								

☐ Allow vendor to submit questions

☐ Send notification when vendor submitting question

Save & Continue Reset

Directions

37. Click the **Q&A** tab. To dialogue with vendors, select the **Allow vendor to submit questions** checkbox.

If you would like COMMBUYS to notify you when a vendor submits a question, select the **Send notification when vendor submitting question** checkbox.

If desired, you and/or the vendor can enter a **Question Subject** and **Question** into the respective fields, and the other party can respond in the **Answer** field.

If you wish to display the dialogue on the Web, select the **Show on Web** checkbox. The **Show Original Vendor Only** checkbox is available if appropriate.

38. If desired, click the **Reminders** tab to send a reminder to yourself or another person within your organization.

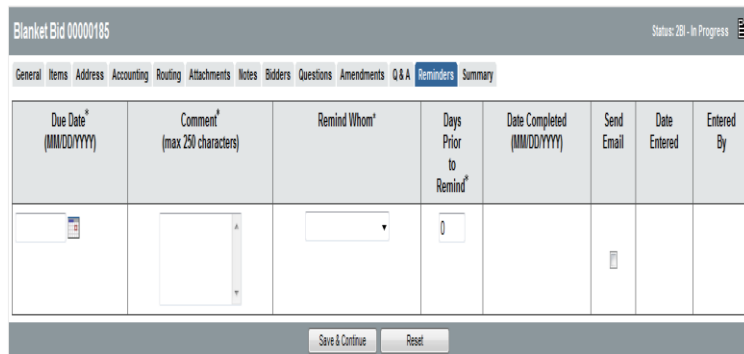
Use the calendar icon in the **Due Date** field to select the date of the reminder then enter your reminder text in the **Comment** field.

Select yourself or another internal recipient in the drop-down menu next to the **Remind Whom** field.

If you would like to send a "tickler" or pre-notification in advance of the reminder, enter the number of days of the pre-notification in the **Days Prior to Reminder** field.

If you would like the reminder send via email, select the **Send Email** checkbox.

When complete, click the **Save & Continue** button.



Blanket Bid 00000185 Status: 281 - In Progress

General Items Address Accounting Routing Attachments Notes Bidders Questions Amendments Q&A **Reminders** Summary

Due Date* (MM/DD/YYYY)	Comment* (max 250 characters)	Remind Whom*	Days Prior to Remind*	Date Completed (MM/DD/YYYY)	Send Email	Date Entered	Entered By
			0				

Save & Continue Reset

Job Aid:

How to Create a Bid using a Requisition

Screenshot

Open Market Bid 0000144 Status: 39 - In Progress

General Items Address Accounting Routing Attachments(?) Notes Bidders Questions Amendments Q & A Reminders **Summary**

Header Information

Bid Number:	0000144	Description:	Shoe Van Party	Status:	39 - In Progress
Purchaser:	Buyer Buyer	Minor Status:		How Solicited:	Email
Organization:	Operational Services Division				
Fiscal Year:	14	Department:	BSAS - Bureau of Substance Abuse Services	Location:	2300 - Central SA
Show On Web:	Yes	Allow Electronic Quote:	Yes	Required Date:	01/15/2014
Bid Opening Date:	01/15/2014 12:20:00 PM	Available Date:	01/14/2014 12:20:00 PM		
Purge Date:					
Bid Type:	Open Bid	Informal Bid:	No		
Control Code:		Estimated Cost:	\$750,050.00	Print Desc Detail:	
Alternate ID:		Purchase Method:	Open Market	Catalog Id (for contract):	
Blanket/Contract Begin Date:		Blanket/Contract End Date:		Type Code:	
Info Contact:	Contact Leslie Doughty at (555)555-5555	Bulletin Desc:		Pre-Bid Conference:	
U N S P S C Code Certified Required:	No	Acknowledge inclusion required:	No	Hour of Acknowledge inclusion:	0.0
Subcontractor Info:		Quote Notification:	No		
Date Last Updated:	01/14/2014 12:39:19 PM	User last Updated:	Buyer Buyer	Item Single Award Only:	No
Ship to Address:	Operational Services Division Address Boston, MA 02108 US Email: ejacobson@operationalbidings.com Phone: (555)555-5555	Bill to Address:	Operational Services Division Address Boston, MA 02108 US Email: ejacobson@operationalbidings.com Phone: (555)555-5555	Print Format:	Bid Print
Solicitation Enabled:	No				
Invoice Method:	Three Way Match				

Bidders:

Vendor Id	Vendor Name	Preferred Delivery Method	Notifications	Responded
00000001	Wm of Style, LTD	Email		No

Submit for Approval Cancel Bid Clone Bid Print

Directions

39. Click the **Summary** tab to review the bid information.

Scroll to the bottom of the page and click the **Submit for Approval** button.

A pop up message appears asking if you want to submit this bid.

Click **OK**

Open Market Bid 0000144 Status: 39B - Ready to Send

General Items Address Accounting Routing Attachments(?) Notes Bidders Questions Amendments Q & A Reminders **Summary**

Header Information

Bid Number:	0000144	Description:	Shoe Van Party	Status:	39B - Ready to Send
Purchaser:	Buyer Buyer	Minor Status:		How Solicited:	Email
Organization:	Operational Services Division				
Fiscal Year:	14	Department:	BSAS - Bureau of Substance Abuse Services	Location:	2300 - Central SA
Show On Web:	Yes	Allow Electronic Quote:	Yes	Required Date:	01/15/2014
Bid Opening Date:	01/15/2014 12:20:00 PM	Available Date:	01/14/2014 12:20:00 PM		
Purge Date:					
Bid Type:	Open Bid	Informal Bid:	No		
Control Code:		Estimated Cost:	\$750,050.00	Print Desc Detail:	
Alternate ID:		Purchase Method:	Open Market	Catalog Id (for contract):	
Blanket/Contract Begin Date:		Blanket/Contract End Date:		Type Code:	
Info Contact:	Contact Leslie Doughty at (555)555-5555	Bulletin Desc:		Pre-Bid Conference:	
U N S P S C Code Certified Required:	No	Acknowledge inclusion required:	No	Hour of Acknowledge inclusion:	0.0
Subcontractor Info:		Quote Notification:	No		
Date Last Updated:	01/14/2014 12:39:19 PM	User last Updated:	Buyer Buyer	Item Single Award Only:	No
Ship to Address:	Operational Services Division Address Boston, MA 02108 US Email: ejacobson@operationalbidings.com Phone: (555)555-5555	Bill to Address:	Operational Services Division Address Boston, MA 02108 US Email: ejacobson@operationalbidings.com Phone: (555)555-5555	Print Format:	Bid Print
Solicitation Enabled:	No				
Invoice Method:	Three Way Match				

Bidders:

Vendor Id	Vendor Name	Preferred Delivery Method	Notifications	Responded
00000001	Wm of Style, LTD	Email		No

Attachments

Send Bid Actions

Option(s) ☒ Change bid status to "Sent" and notify vendors ☐ Change bid status to "Sent" only.

Send Bid

Cancel Bid Clone Bid Print

40. Once the bid is approved, return to the Summary page and scroll to the bottom of the page and click the **Send Bid** button.

This will notify any vendor listed on the bid as well as post it on COMMBUYS for all vendors to search and bid on.

Job Aid:

How to Create a Bid using a Requisition

Screenshot

Vendor Notification Result

Subject: Bid Notification - Bid # 0000144, Show War Party

Email Recipients

Delivery Date: 11/14/2014 02:14:35 PM

VendorID	Vendor Name	Email Address
000001	ide of Style LTD	Stylor Stylor (indabante-grant@centure.com)

OK

Status: 2BS - Sent



Directions

41. Click the **OK** button to complete the process.

The Bid status updates to 'Sent' and will appear on COMMBUYS based on the available date and bid opening dates.